

The Profile Handbook
The eRA Project
Data Integrity Committee



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FOREWORD

The purpose of this Handbook is to provide to users of the Electronic Research Administration (eRA)/Information for Management, Planning, Analysis, and Coordination (IMPAC) II System, guidance in managing Profiles to avoid creating duplicate Profile records. Screen shots and supporting text illustrate the difference between a Profile record and a Role record, the relationship between them, and how to maintain them.

The Profile record of an individual contains data about the individual, such as addresses, degrees, expertise, and employment. Role records document the business of the individual with the NIH, for example, applying for a grant, serving as the Principal Investigator (PI) on a grant, or serving on an advisory committee. Role records of an individual are associated with the Profile record of the individual. In other words, the Profile ties together all the individual's Role records. The Profile and its Role records form a complete picture of the individual's relationship to the National Institutes of Health (NIH).

The *Intended Audience* for this Handbook includes novice users, experienced users, technologically challenged users, and technological savvy users. Therefore, some of you may find the explanations simplistic, some may find them challenging, and some may find them "just right." Therefore, we insert this symbol — * — to indicate a section that may be of interest to only the experienced or tech-savvy user.

If you have any questions about the content in this document or if you would like to report a factual error, please contact Susann Schultz (schultsu@mail.nih.gov) or Maria Bukowski (bukowskm@mail.nih.gov).

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1.0 The Profile and Its Role Records

eRA/IMPAC II stores person data in records that encompass all known data regarding an individual who either does business with the National Institutes of Health (NIH), or other agencies within the Department of Health and Human Services (DHHS), or Federal Staff (NIH or other agencies of DHHS). "Role" records document the business of the individual with the NIH, for example, applying for a grant or serving on an advisory committee. The Profile record of an individual ties all the individual's Role records together. Figure 1 illustrates the relationship between the Profile Record — referred to simply as "the Profile" — and its Role records.

As you can see, an individual may have many Role records but only one Profile. The role record identifies the Person Type and the corresponding Role Type. The Role records associated to the Profile of an individual as reflected in Figure 1, show 3 person types: Project Person [a Principal Investigator (PI)], Committee Person, and Federal Employee.

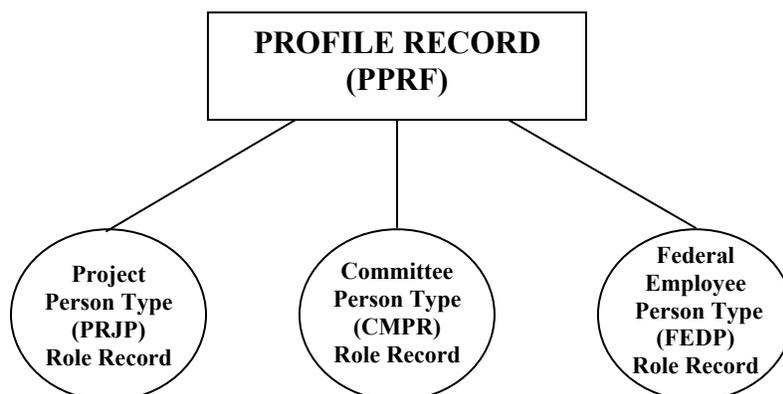


Figure 1. A Profile and Its Role Records

* The eRA/IMPAC II Production database (IMPP) contains hundreds of tables. In this discussion, we are concerned mainly with the contents of four tables that reside in the eRA/IMPAC II database, which are especially relevant to managing Profiles and their related Role records:

- `persons_t` — Tracks information on people within the system. An individual may have more than one row within this table; each role entry for the individual is tied back to the one, and only one, Profile record for the individual.
- `person_involvements_t` — Contains information about the role (e.g., PI, trainee, supportee) an individual assumes within a project. This may also include related appointment data (i.e., for trainees) for a specific grant or other project. A separate row will exist for each involvement.
- `person_role_involvements` — Contains descriptions of the activity related to the assigned role, such as application/grant number, the name of the study group, name of the committee, and so forth.

- check_registers_t — Contains the checks that have been written to consultants/committee members to pay for their expenses when attending meetings.

* eRA/IMPAC II supports not only IMPP¹ but also the IMPAC II Reporting Database (IRDB). Here are a few differences between the databases:

- IMPP is the database that is updated whenever a user logs on to IMPAC II and enters data.
- IRDB is updated with IMPP data every evening.
- Trainee historical data from 1998 or earlier reside only in IMPP. More current information (approximately 1998 to the present) is available in IRDB.
- PI history data reside only in IRDB.
- Not all IMPP tables are available in IRDB, and not all IRDB tables are available in IMPP.
- Some fields in IMPP are renamed in IRDB.
- Several IMPP tables are combined into one IRDB table. These IRDB tables are NOT views; they were designed before the decision to create views was made.

¹ IMPP stands for IMPAC II Production database. It is also referred to as OLTP or the On-Line Transaction Database. This database is the database that is updated by you, the user, whenever you enter data via an eRA/IMPAC II module, such as Grants Management, Peer Review, Training Activities, Population Tracking, and Committee Management. When logging on to eRA/IMPAC II, you must identify the IMPP database as IMPPRD. The "RD" is required for running reports from the Report Server.

1.1 Valid Values for Role Record Data

Each role record contains only one person type code and only one corresponding role type code. An individual can have many role records assigned to his or her Profile, as illustrated in Figure 1, above. Table 1 demonstrates the relationship of person type to role type. The values of these codes are the valid values allowed by IMPAC II. Only these values can be assigned to an individual in his or her role record.

A person can have multiple records of a single role type. For example, an individual can have several role records with person type code of FEDP (Federal Employee) with, for example: (1) a role record as a closeout specialist; (2) a role record as a grants specialist; and (3) a role record as a program official – however unlikely that a Grants Specialist would be assigned as a Program Official – in a pinch it could happen!

Table 1. Role Record Valid Values

IMPAC II Tables				
persons_t	person_role_involvements		person_involvements_t	Description
Person Type Code	Person Type Code	Role Type Code	Role Type Code	
ALS	Alias	ALS, PI, STAFF	No equivalent Role Type Code in this table	Alias – indicates that this record was a duplicate profile record that was collapsed into another profile
CMPR	Committee Member	CMEM	No equivalent Role Type Code in this table	Committee Member
ERA	From COMMONS	ERA	No equivalent Role Type Code in this table	Commons record
FEDP	Federal Emp.	STAFF	No equivalent Role Type Code in this table	Federal Employee
INIT	Cmte Initial Role	INIT	No equivalent Role Type Code in this table	Initial Role on a Committee
FEDP	No equivalent Person Type Code in this table	CS	CS	Closeout Specialist
FEDP	No equivalent Person Type Code in this table	GMO	GMO	Grants Management Officer
FEDP	No equivalent Person Type Code in this table	GS	GS	Grants Specialist
FEDP	No equivalent Person Type Code in this table	PO	PO	Program Official
PRJP	No equivalent Person Type Code in this table	TRK	TRK	Track grants that are not officially assigned to the user
PRJP	Mtg Attendee	MRST	No equivalent Role Type Code in this table	Meeting Attendee
PRJP	Project Person	KP	KP	Key Personnel
PRJP	Project Person	PBCK	No equivalent Role Type Code in this table	Payback
PRJP	Project Person	PI	PI	Principal Investigator
PRJP	Project Person	SUP	SUP	Supportee
PRJP	Project Person	TA	TA	Trainee Appointment
FEDP	Project Person	STAFF	No equivalent Role Type Code in this table	Federal Employee
FEDP	Initial CM Role	STAFF	No equivalent Role Type Code in this table	Initial Committee Management Role – Federal Employee

1.2 The Person ID

eRA/IMPAC II stores two types of Person identification (ID) numbers in its databases: Person ID of the Profile and Person ID of the Role record. Table 2 illustrates the relationship between the Person ID of the Profile and the Person ID of the Role record. Each row represents a record.

Row 1 reflects a Profile record for an individual: the Person ID of the Role = 100010 and the Person Type Code = PPRF → Person **PR**ofile **F**ile. Note that the PPRF has no assigned Person ID of the Profile.

* The Profile itself does not reflect an individual's involvements (roles) with the NIH/IC. However, role types CS, GS, PO, and GMO are associated with the Profile person type (PPRF). These are NIH personnel who manage the business that other role types (e.g., PI, TA, SUPP) have with NIH/IC. It would be inefficient to assign to a CS, GS, PO, or GMO an individual role to each of the records that a CS, GS, PO, or GMO has to handle. This method allows a GS to be assigned to multiple grants without having to have a role record for each grant assigned to him or her.

The PPRF person type code indicates that this Profile record ties together all role records for an individual. This becomes clearer as you look at Rows 2 and 3. The Person ID of the Role is associated with the Person ID of the Profile. Associating the Person ID of the Profile to an individual's Role records is how the Profile ties all the role records together for an individual.

The Person Type Code defines the Person ID: Person Type code = PPRF always indicates a Person ID of a Profile. All other Person Type Codes indicate Person IDs of a Role record.

Table 2. Person IDs

Row	PERSON_ID of the Role	Person Type Code	PERSON_ID of the Profile	Record Type
1	100010	PPRF		Profile Record
2	100011	CMPR	100010	Role Record
3	100012	PRJP	100010	Role Record

Each Role record (Rows 2 and 3 in Table 2, above) stores information about an individual at the time when the row was created, such as degrees, addresses, expertise, employment. The Profile (Row 1) may be updated as subsequent role records are created. For example, since his time on a Committee, (Row 2) this individual may have left Harvard to join a research lab at New York University (NYU). When he is assigned as a Project Person (Row 3), his profile could be updated to reflect his move to NYU. The Profile is maintained through "Person Administration," screen COM1200.² (Maintenance of the Profile is discussed in Appendix A, "Profile Management.")

² The identification Screens that are "Common" to all eRA/IMPAC II modules begin with the acronym 'COM'.

* The relationship between a profile and its roles is “recursive” – in other words, everything is assigned a person_id, and the person_type_code is what defines whether or not the person_id is actually a profile or a role level record. When joining persons_t to any other table in the database, the person_id in persons_t should be used. Many individuals make the common mistake of joining the project_versions_t.pi_profile_person_id to the profile_person_id in persons_t. Note that if the join is done in this manner, each pi_profile_person_id of 100010 when joined to the profile_person_id column in persons_t will bring back 2 copies of data (and will NOT bring back the profile record, which does not have a value in that column), resulting in inaccurate data returned.

Let's look at another example — IMPAC II Role records for Dora Bershanoff. Notice that, as in Table 2, the Person ID of the Profile is the same value for all 4 Role level records in Table 3. For each role record, a unique Person ID for the role is assigned, as shown in Column 2. As shown in Column 3, each role record is assigned a person type code: project person and committee member. These correspond to the role type codes listed in Column 4. Column 5 displays the role involvement for each role: two grants and two study sections.

Table 3. Role Records — Dora Bershanoff

	1	2	3	4	5
Role Record	Person ID of the Profile	Person ID of the Role	Person Type Code	Role Type Code	Role Involvement
1	7846833	7846835	Project Person (PRJP)	PI	2 R01 MH057511-06
2	7846833	7846836	Project Person (PRJP)	PI	2 R01 MH057683-06 A2
3	7846833	7846837	Committee Member (CMPR)	CMEM	Virology Study Section Appt #321709
4	7846833	7846839	Committee Member (CMPR)	CMEM	Virology Study Section Appt #321710

1.3 Profile and its Role Records — A Closer Look

On any IMPAC II screen where a Person ID of a Profile or Person ID of a Role is displayed, the identification number is labeled Person ID. Depending where you are looking, the Person ID number reflects either the Person ID identifies a Profile or Role record. Take a look at Figure 2, below, which illustrates the relationship between the Profile and its Role records. This is a view of an individual's role records. The top section of the displayed screen is labeled 'PROFILE DATA'. Notice the field labeled 'PIN#'. PIN stands for Person Identification Number. The PIN is the Person ID of the Profile. The bottom section of the displayed screen is the labeled 'ROLE DATA'. The list contains Role data and some data that are shared with Profile data, such as the social security number. Notice that J.B. Manon has multiple records as Person Type Code of 'Project Person' (PRJP), each role record associated with a grant. The column labeled 'Person ID' lists the Person ID of each Role record.

Person ID of the Profile

View Person Role Records

PROFILE DATA

PIN#	Last Name	First Name	Middle Name	SSN	Prefix	Suffix
0001866150	Manon	J.	B.	002200333		

ROLE DATA

Person ID of the Role

Role Type	Person ID	Last Name	First Name	Middle Name	SSN	Prefix	Suffix	Created Date
Project Pers	0007723339	Manon	J.	B.	*****			10/16/2003
Project Pers	0007470813	Manon	J.	B.	*****			11/18/2002
Project Pers	0007009242	Manon	J.	B.	*****			12/03/2001
Project Pers	0006964588	Manon	J.	B.	*****			10/10/2001
Project Pers	0006414170	Manon	J.	B.	*****			11/11/1999
Project Pers	0001822982	Manon	J.	B.	*****			06/28/1997

Create Alias Update Alias Delete Alias View Role Details Close

Figure 2. Looking at Role Records

1.4 Summary

Person Types and Role Types assigned to an individual identify an individual's involvement, or business, with the NIH. IMPAC II assigns unique Person ID numbers to each individual's Role records. IMPAC II associates the Person ID of each role to the unique Person ID of the Profile. Thus, a unique Person ID of a Profile can be associated with multiple Person IDs of Role records; conversely, a Person ID assigned to a Role can be associated with only one Person ID of a Profile. And in a perfect world, each individual registered in IMPAC II will have only one Profile in IMPAC II.

2.0 Dangers of Incorrect Profiles

We mentioned the perfect world in which each individual registered in eRA/IMPAC II has only one Profile in eRA/IMPAC II. Here we address what happens if an individual has more than one Profile, or more than one individual is under a single profile.

2.1 PI History Report

Let's take a moment to discuss the eRA/IMPAC II "PI History Report." Many people think that when one runs a PI History Report, the report will contain information only about the PI in whom the user is interested. Not necessarily so. The report may include other PIs: those with the same last name or those whose name follows alphabetically.

* The PI History Report was designed for use by Referral Officers. Referral Officers use the report to determine IC, Division, and Branch assignments. The short version may not include prior history if the latest support year record has not had a review and the meeting data for the prior year is identical. The long version of the PI History contains all grant history.

2.2 Duplicate Profiles

Table 4 provides an example of duplicate profiles for an individual PI in the database. J. B Manon has grants with two Institutes: National Institute of Diabetes and Digestive and Kidney Diseases (NIDDK or 'DK') and National Cancer Institute (NCI or 'CA'). Three Profile records exist in eRA/IMPAC II for J.B. Manon, each with a unique Person ID assigned to each Profile: Person ID 1866150 (rows 1 to 6, which reflect grants with NIDDK); Person ID 6532899 (row 7, a grant with NCI); Person ID 653818 (rows 8 to 11, grants with NCI).

Table 4. Multiple Profile Records — J.B. Manon

Profile and its Role Records (Person ID of the Profile = 1866150)					
	Person ID of the Profile	Person ID of the Role	Person Type Code	Role Type Code	Role Involvement
1	1866150	6414170	Project Person	PI	1 R03 DK058386-01
2	1866150	1822982	Project Person	PI	1 R01 DK053970-01
3	1866150	6964588	Project Person	PI	5 R03 DK058386-02
4	1866150	7009242	Project Person	PI	1 U01 DK062481-01
5	1866150	7470813	Project Person	PI	5 U01 DK062481-02
6	1866150	7723339	Project Person	PI	5 U01 DK062481-03
Profile and its Role Records (Person ID of the Profile = 6532899)					
	Person ID of the Profile	Person ID of the Role	Person Type Code	Role Type Code	Role Involvement
7	6532899	6635431	Project Person	PI	1 R01 CA654321-01A1

Profile and its Role Records (Person ID of the Profile = 6593818)					
	Person ID of the Profile	Person ID of the Role	Person Type Code	Role Type Code	Role Involvement
8	6593818	6642386	Project Person	PI	5 R03 CA899455-02
9	6593818	6852639	Project Person	PI	1 R01 CA098765-01
10	6593818	7107575	Project Person	PI	5 R01 CA098765-02
11	6593818	7653257	Project Person	PI	5 R01 CA098765-03

If we were to run a PI History report on J. B. Manon, we would probably get back history for the 3 Manons. Suppose that one profile may not have been updated properly. When the Grant is released, if the application is associated with the outdated profile, the Notice of Grant Award could be sent to an old email address, and the Institution would not receive it.

If you were to nominate J.B. Manon to an advisory committee, you would be unable to determine if he were available or if you had the correct person. You would have to run a Committee Service History report on each Profile to view his entire committee service to determine if Manon is already serving on an NIH advisory committee.

Duplicate profiles affect adding an individual to a committee or roster, which can lead to associating a role to the wrong profile. The user searches for a specific individual. The problem occurs if time isn't taken to make sure that the person selected is indeed the individual required. For example, a user could create a role record with an SSN or name that is different from an existing Profile for the PI with whom the role should be associated. When this happens, the role record reflects the wrong SSN, which affects the voucher.

2.3 Mixed Profiles

A "mixed" profile has more than one individual assigned to it. There are times when a PI has to be changed on a grant. Changing a PI on an application or a grant does not create a duplicate Profile — and should not cause the Profile name to change. However, when performed incorrectly (using 'Edit PI' instead of 'Change PI') the result is a name change on the Profile, and on the role record of the single grant, leaving the balance of the role record grants under the old name in IMPP. The name of the original PI is changed to the name of the new PI. The data for both PIs are mixed or "intertwined." For example, Dora Bershanoff is currently the PI on Grant 2 R01 MH057511-06. The PI is changed to J. B. Manon. The change is mistakenly made through 'Edit PI' when 'Change PI' should have been selected. Here is what can happen:

- Run a PI history on Dora Bershanoff, and J.B. Manon is included.
- In IRDB, since reporting is only based on the Profile, ALL the grants, which previously belonged to Bershanoff, now belong to Manon.
- If the SSN is not changed with the name, then the SSN is associated with the wrong individual. If a voucher is cut with the Profile in this state, the 1099 will be incorrect and a new error will be introduced into the table `check_registers_t`.

- Degree codes, addresses, and all personal data for the profile do not match the new name. Reporting off the Profile in this state will cause Bershanoff's information to be applied to Manon.
- The incorrect name will appear on the records in the IRDB containing the Profile (Current, History and Pub files).
- Person searches will result in retrieval of a Profile with a different name. Users, unable to match the original investigator name, will probably construct a new Profile.
- Future data can be assigned to the wrong profile, compounding the error.
- Data changes by personnel attempting to reconcile old auxiliary data to the new name, will make extensive manual correction with extensive data verification necessary.

The same data problems will occur if profiles on individuals sharing the same name are incorrectly collapsed. This problem is almost impossible to find unless the user knows detailed information on one of the two individuals.

2.4 What To Do With Duplicate or Mixed Profiles

Duplicate profiles should be "collapsed" under one Profile. The current process is to collapse duplicate profiles into (a) the Commons Account-associated Profile; (b) the best profile; or (c) the earliest profile.³ When you find more than one profile for an individual, or more than one individual under a profile, send a request to the Systems Quality Assurance & Interfaces Branch (SQAIB) via the eRA/IMPAC II Help Desk. Include the Person IDs of the Profiles. Five ways to submit a request:

- Email the NIH Help Desk: Helpdesk@nih.gov Make sure the subject line is "eRA Profile Collapse Request for SQAIB."
- Ask your IC-designated data quality control contact. For a list go to http://era.nih.gov/Docs/IC_Data_Quality_Control_Contacts_10-23-02.doc.
- Ask your IC IMPAC II Technical Coordinator. For a list go to http://impacii.nih.gov/support/techrep_list.cfm.

Now let's look at the best way to find an individual and determine that the individual is the individual you require and avoid creating duplicate Profiles.

³ In some cases, the earliest profile may be a contract-associated profile, which we do not want to use. However, all things considered, we do try collapse into the earliest profile.

3.0 Finding the Right Profile

eRA/IMPAC II permits searches for a person from these IMPAC II modules: Training Activities (TA), Committee Management (CM), Peer Review (REV), Grants Management (GM), IC Operations (ICO), Population Tracking (POP) through ICO, and User Administration (UA).⁴ You can also view person data through QuickView (QV). There are some minor differences in the menu selections on the "Person Screen Header," depending from which IMPAC II module you access COM1100. However, the body of the screen remains the same. Figure 3 is a screen shot of the Person Search Screen accessed via TA. When you are asked to create an IMPAC II role record for an individual or to update the profile record, the best way to avoid creating duplicate profiles is to search for the individual in a convenient yet generic way. For example, in Committee Management, you need to add a person to a roster or in Grants Management you need to change the PI on a grant. You will search for the person and then make your choice. (Differences in header menu selections are addressed in Appendix A.)

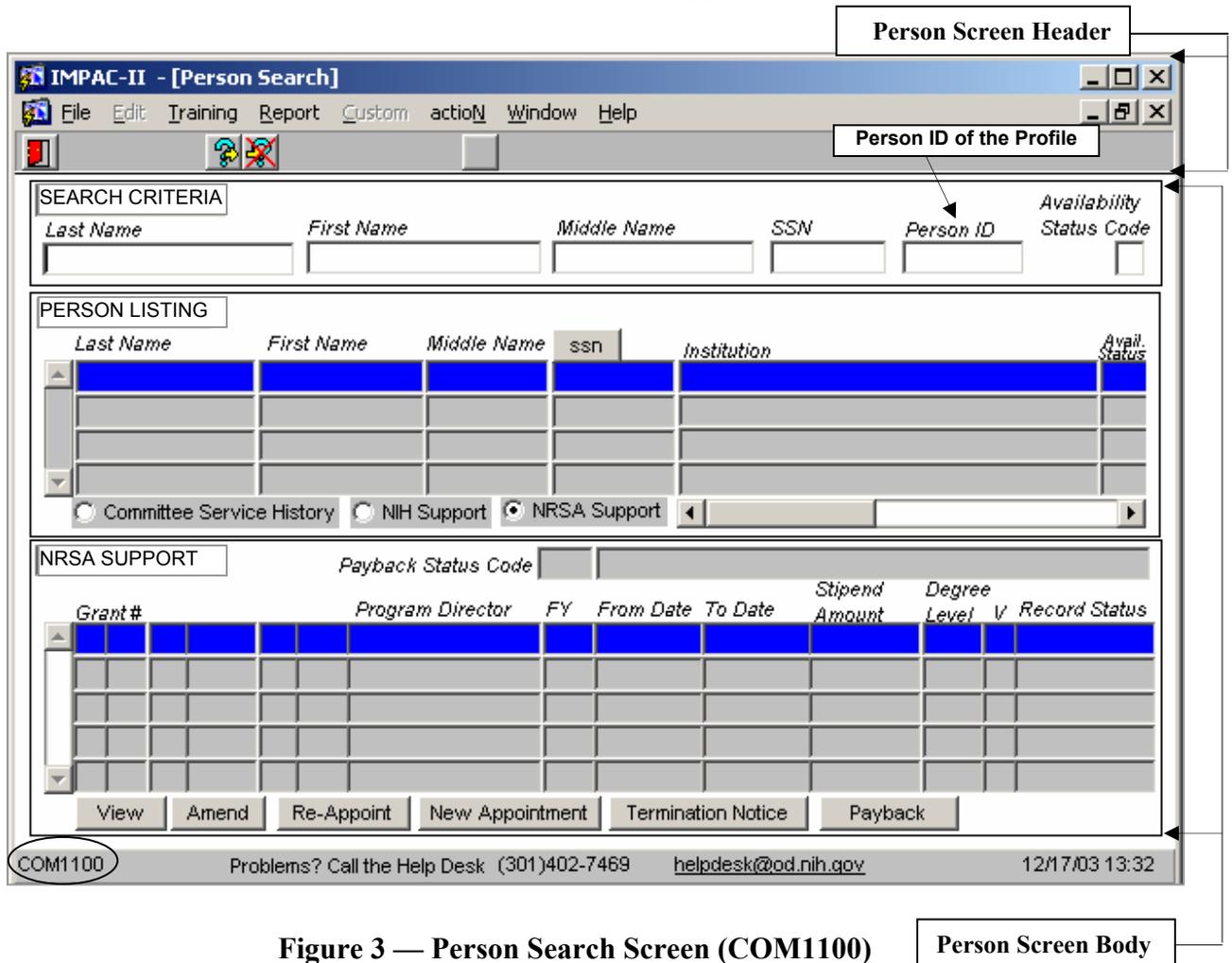


Figure 3 — Person Search Screen (COM1100)

⁴ Those Grantee Institutions who have registered on the Commons can also create records. When the PI record is created, IMPAC II will find any record that it thinks may be the PI's existing record and provide a list from which the Grantee Institution Official can select an existing PI record to avoid a second profile from being created.

The body of the Person Search screen contains three areas: Search Criteria, Person Listing, and a third section provides data depending on the selection made from one of these three selections available from the Person Listing area: 'Committee Service History', 'NIH Support', or 'NRSA Support', as shown in Figure 4. Analyzing the data available in these areas and data available from other options that become available after IMPAC II returns the hits, will help to avoid creating duplicate profiles.

Person ID of the Profile

SEARCH CRITERIA

<i>Last Name</i>	<i>First Name</i>	<i>Middle Name</i>	<i>SSN</i>	<i>Person ID</i>	<i>Availability Status Code</i>
<input type="text"/>	<input type="checkbox"/>				

PERSON LISTING

<i>Last Name</i>	<i>First Name</i>	<i>Middle Name</i>	<i>ssn</i>	<i>Institution</i>	<i>Avail. Status</i>

Committee Service History
 NIH Support
 NRSA Support

Committee Service History

<i>Committee Title</i>	<i>Committee Code</i>	<i>Type</i>	<i>Status</i>	<i>Proposed Date</i>		<i>Actual Date</i>	
				<i>Start</i>	<i>End</i>	<i>Start</i>	<i>End</i>
Virology Study Section	RG 101219	IRG	Other	08/01/2004	08/01/2004	08/01/2004	08/01/2004

NIH Support

<i>Project Number</i>	<i>Fiscal Year</i>	<i>Project Title</i>	<i>Role</i>	<i>Total Award</i>	<i>Subproj. ID</i>

NRSA SUPPORT

<i>Grant #</i>	<i>Program Director</i>	<i>FY</i>	<i>From Date</i>	<i>To Date</i>	<i>Stipend Amount</i>	<i>Degree Level</i>	<i>V Record</i>	<i>Status</i>

Figure 4 — Body of the Person Search Screen (COM1100)

3.1 Search Criteria Area

Depending on your access rights, you can perform these searches in GM, CM, or TA.

If you use as your criteria last name, first name, middle initial, you will limit your search, and may find one person. But what if the person has several profiles — some with no middle initial, some with a "nickname" for the first name, or a misspelled last name or even a wrong middle initial? Also, keep in mind issues associated with punctuation and spacing. Finding O'Brien could be tricky, as could finding Mac Arthur.

Let's look at Tables 5 and 6. Table 5 lists the 3 profile records that exist for "Manon" and "Mannon." Table 6 presents the search results based on a variety of search criteria used to find a PI, whose name is J.B. Manon.

Table 5. Three Profile Records

Record	Person ID of the Profile	Last Name	First Name	Middle Initial	SSN
1	1866150	Manon	J.	B.	002200333
2	6532899	Mannon	John	B.	
3	6593818	Manon	J		

Table 6. How Do I Find My PI?

Search	Search Criteria	Results (Hit List)		
		Record 1	Record 2	Record 3
1	Last Name = Manon	X		X
2	Last Name = Manon First Name = John			
3	Last Name = Manon First Name = J	X		X
4	Last Name = Manon First Name = J Middle Initial = B	X		
5	Last Name = Man%	X	X	X
6	Last Name = Man% First Name = J%	X	X	X
7	Last Name = Man% First Name = J% SSN = %0333	X		
8	Last Name = Man% First Name = J% SSN = 002%	X		

Notice that the only search criteria that return all three records are the most generic, Searches 5 and 6. In these queries, we use the "wildcard" — the percent symbol (%). 'Man%'

tells IMPAC II, "Find anyone whose last name begins with 'Man' – I don't care what comes after 'Man'." Search criteria in either UPPERCASE or lowercase will return the same results. For example, both 'MAN%' and 'Man%' will return the results as shown in Search #5 in Table 6. If we include a partial SSN, we get one hit (Searches 7 and 8), but we can have confidence that this record might be the most accurate, if the SSN is correct. You could update this record and request a collapse of the three Manon records.

PLEASE NOTE: Using only the criterion 'Man%' would bring back hundreds of hits. Using 'J%' in addition narrows the search. However, if you use 'MANO%', 'Mannon' will not be returned; this could be a misspelling of the PI's name. As shown in Figure 5, placing the cursor in the "Availability Status Code" check box accesses the List of Values (LOV) from which to make a selection. Making a selection would limit your search parameters but may prevent your finding the PI for whom you are searching.

The best way to balance between search parameters that are too generic and too restrictive is to use the wildcard (%) in your criteria for both first name and last name. If it exists and you know the SSN, the best Profile to use is the one returned using the wildcard (%) in your criteria for last name, first name (if desired), and the last 4 digits of the SSN (e.g., smit%, fre%, %4321).

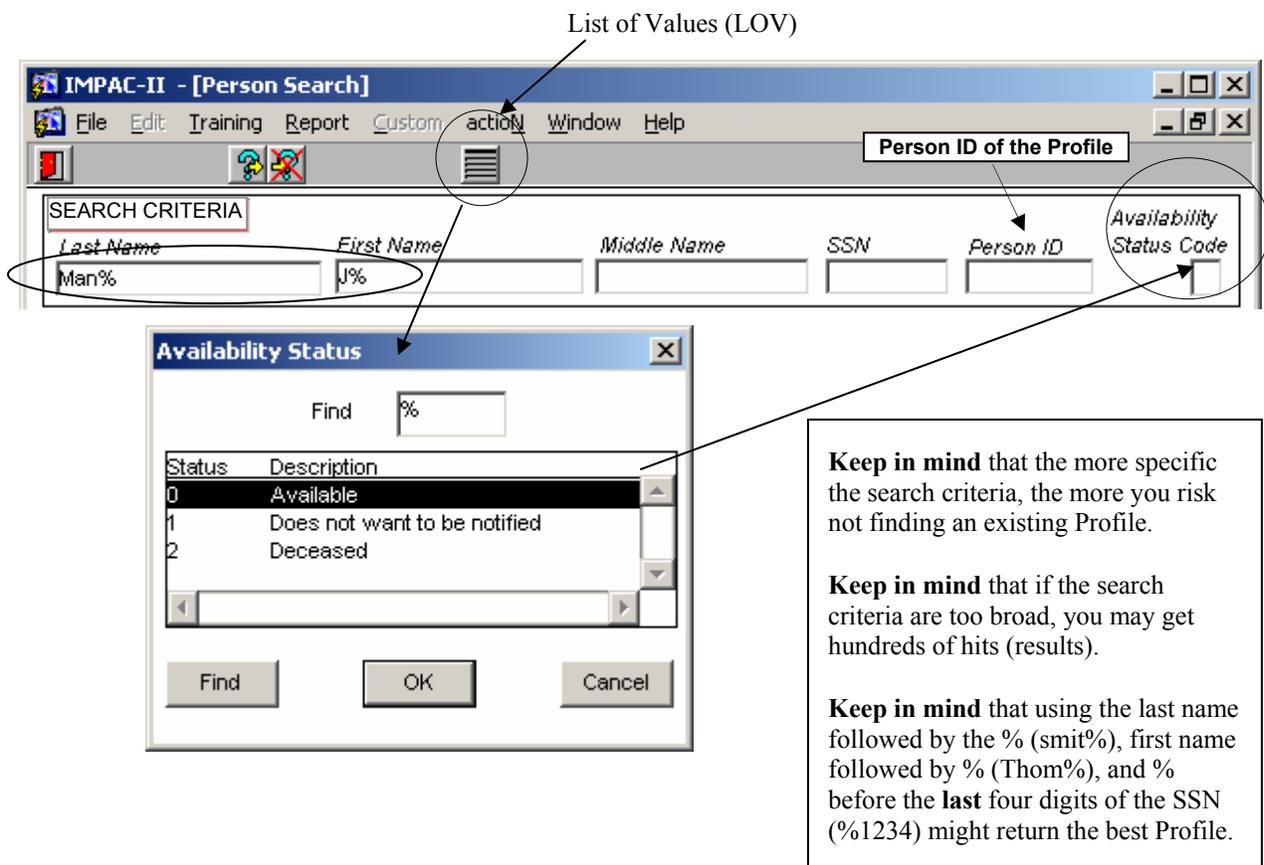


Figure 5 — Using Wildcards in the Search Parameters (COM1100)

3.2 Person Listing Area

The results of the query are displayed in the Person Listing Area, as shown in Figure 6, below. We need to verify: (1) which profile record is the one we need, or (2) whether two or all three records are for the same PI, or (3) whether we need to create a new profile record.

Also notice the four buttons that are now available in the 'Person Listing' area: 'Edit Profile', 'Create Profile', 'View Role', and 'View Audit'. These can help you to select the PI you need and confirm multiple profiles exist for the PI. First, let's take a look at 'View Audit' and 'View Role'.

The screenshot shows the 'Person Listing Area' interface. At the top, there is a 'SEARCH CRITERIA' section with fields for Last Name, First Name, Middle Name, SSN, Person ID, and Availability Status Code. Below this is a 'PERSON LISTING' section with buttons for 'Edit Profile', 'Create Profile', 'Combine Profile', 'View Role', and 'View Audit'. A table of search results is displayed below the buttons. The first row is highlighted in blue and contains the following data: Last Name: Manon, First Name: J., Middle Name: B., ssn: *****, Institution: CHILDREN'S HOSPITAL OF PHILADELPHIA, Avail. Status: 0. Below the table are radio buttons for 'Committee Service History', 'NIH Support', and 'NRSA Support'. A callout box on the right points to the 'Person ID' field in the search criteria and the 'Person ID' field in the detailed view. A callout box on the left explains that scrolling to the right reveals additional data in the detailed view.

Person ID of the Profile

SEARCH CRITERIA

Last Name	First Name	Middle Name	SSN	Person ID	Availability Status Code
Man%	J%				

PERSON LISTING Edit Profile Create Profile Combine Profile View Role View Audit

Last Name	First Name	Middle Name	ssn	Institution	Avail. Status
Manon	J.	B.	*****	CHILDREN'S HOSPITAL OF PHILADELPHIA	0
Mannon	John	B.			0
Manon	J				0

Committee Service History NIH Support NRSA Support

Person ID of the Profile

As you scroll to the right, additional data are displayed. The data could help you determine who is the person you want, provided the data have been entered!

ssn	Avail. Status	Avail. Date	Race	Gender	DOB	Person ID	Suffix
002200333						1866150	

NIH Support

Figure 6 — Person Listing Area (Hits Returned) (COM1100)

PLEASE NOTE: If no hits are returned, then it is safe to assume no Profile exists for the individual being sought. If you have the privilege to create a profile, you can do so through any IMPAC II module to which you have rights and which supports the 'Create Profile' feature. (How to create a profile is discussed in Appendix A.)

3.3 View Audit

As shown in Figure 7, 'View Audit' displays basic 'Profile Data' of the individual. The 'PIN#' is the Person Identification Number, another name for the Person ID of the Profile. The 'Audit Data,' lists all activity performed on the Profile for certain columns and tables: 'Trans[action] Type' lists the type of changes made; 'Information' lists the type of data changed (e.g., degree, person, employment status); 'Audit Description' describes the change made (e.g., Update transaction highlighted indicates that an authorized user entered an SSN; 'Audit Reason' lists why the change was made (the SSN was updated in the profile from the grant application data); 'Creator ID' lists the person or system who made the change,⁵ 'Created Date' records when the transaction occurred.⁶

To return to 'Person Search', click on the 'Close' button.

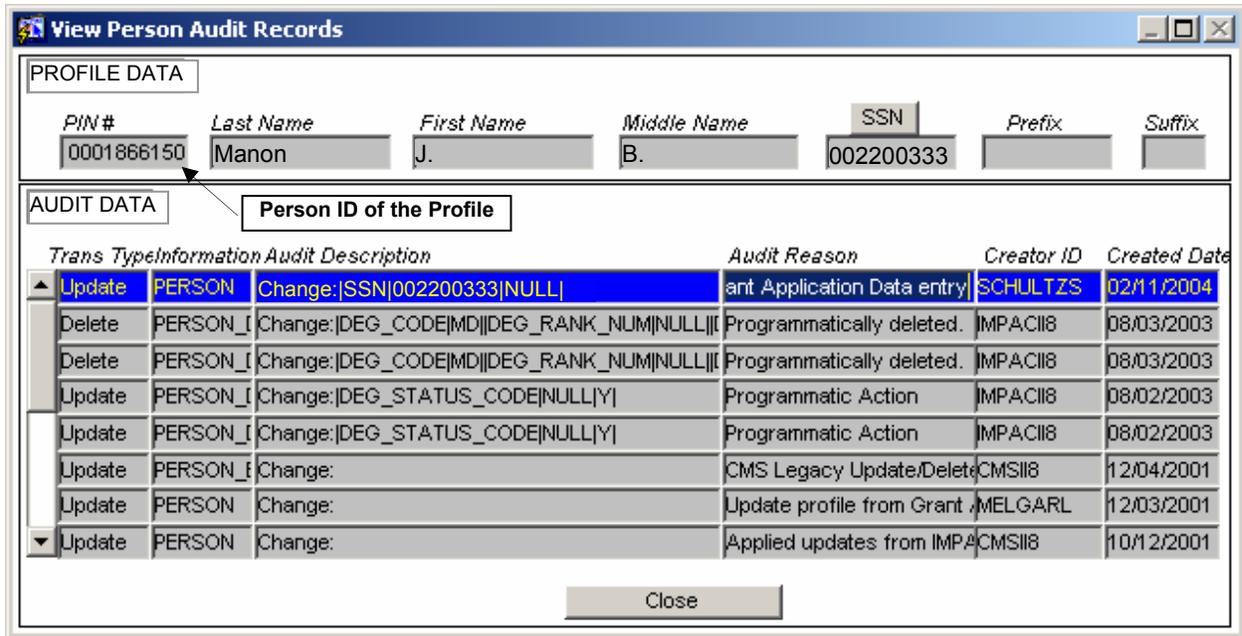


Figure 7. View Person Audit Records

⁵ IMPACII8, CMSII8, DATAADM, ERAAPPS are system user IDs.

⁶ From the IMPAC II web site - <http://impacii.nih.gov/> - you can see all transactions for an application or grant. Scroll down to '7. Web Tools' and click on 'Web Tools'. Then scroll down to 'System Queries' and click on 'Transfer Request Log Search'. Enter the application or grant Appl ID and then click on 'Run List'.

3.4 View Role

'View Role' is a good way to examine PI data to verify information. As shown in Figure 8, 'View Roles' displays the basic Profile Data in addition to a listing of the roles. 'Role Data' displays basic information for each the Role Record associated with the PIN# (Person ID of the Profile): 'Role Type' (this is the Person Type Code stored in person_role_involvements, listed in Table 1, above); 'Person ID' (this is the Person ID of the Role as listed in Table 3). Notice that the 'Person ID', for each of the 6 Role records, corresponds to the Person ID of Role Records 1 through 6 listed in Table 4 for Person ID of the Profile — 1866150.

PROFILE DATA						
Person ID of the Profile						
PIN#	Last Name	First Name	Middle Name	SSN	Prefix	Suffix
0001866150	Manon	J.	B.	002200333		

ROLE DATA								
Person ID of the Role								
Role Type	Person ID	Last Name	First Name	Middle Name	SSN	Prefix	Suffix	Created Date
Project Pers	0007723339	Manon	J.	B.	*****			10/16/2003
Project Pers	0007470813	Manon	J.	B.	*****			11/18/2002
Project Pers	0007009242	Manon	J.	B.	*****			12/03/2001
Project Pers	0006964588	Manon	J.	B.	*****			10/10/2001
Project Pers	0006414170	Manon	J.	B.	*****			11/11/1999
Project Pers	0001822982	Manon	J.	B.	*****			06/28/1997

Figure 8. View Person Role Records

Select a Role Record and click 'View Role Details'. The dialogue box will pop up, as shown in Figure 9. Click 'OK' to access the read-only displays of role details and profile data, as shown in Figure 10. This is a version of Person Administration (COM1200) that displays read-only profile and role data.

Forms

i Your data privileges require this form to be set in Read Only mode.

OK

Figure 9. Role Details Dialogue Box

For the Role highlighted in Figure 8, above (Person ID of the Role = 723339), this read-only display of COM1200 shown as Figure 10, below, provides person information associated with the role (in Area 1) and role person address information (in Area 3). Area 2 provides a view of person address information associated with the Profile. The two sets of address information could be the same. For J.B. Manon, the PI HOM addresses are the same, as shown in Areas 2 and 3.

Click on 'Profile' to access read-only profile, as shown in **Figure 11**.

The screenshot shows a software window titled "IMPAC II - Person Administration [READ ONLY] - [Person]". It has a menu bar (File, Edit, Custom actioN, Window, Help) and a toolbar with buttons for Sensitive, Profile, and Return To Role. The main content is divided into three sections:

- PERSON INFORMATION**: This section is annotated with "This information is for person's PRJP role data." It contains fields for SSN (002200333), PIN (0001866150), Person ID (0007723339), Set Num (A8006271), IMPAC II User ID, and Com Link to Profile. Name fields include Last Name (Manon), First Name (J.), Middle Name (B.), Prefix, and Suffix. Other fields include Title, Citizenship, Country (LOV), Nursing, Consultant?, Availability Status (LOV), and Availability Status Date. A callout box labeled "Area 1" points to this section. Two callout boxes labeled "Person ID of the Profile" and "Person ID of the Role" point to the Person ID field.
- PERSON ADDRESS**: This section is annotated with "This information is for the current profile." It contains a table of addresses with columns for Type, Phone, Alternate Phone, Fax, E Mail, City, and Pref. The first row shows a HOM address with phone (215) 555-1111, fax (215) 555-0000, and email manonjb@chp.org. A callout box labeled "Area 2" points to this section.
- ROLE PERSON ADDRESS**: This section is annotated with "This information is for person's PRJP role data." It contains a similar table of addresses. The first row shows a HOM address with the same phone, fax, and email as the profile address. A callout box labeled "Area 3" points to the "Pref. =Profile?" checkbox, which is checked.

At the bottom of the window, it says "COM1200 Problems? Call the Help Desk (301)402-7469". A callout box at the bottom right explains: "Role Person Address is the same as the Profile HOM address. However, these two addresses can be different. For Address maintenance see Appendix A."

Figure 10. Read-only Person Administration (COM1200) — Role Record: Role and Profile Data

From the read-only version of COM1200 displayed as Figure 10, above, selecting 'Profile' brings you to this version of COM1200 – a read-only Profile, as shown in Figure 11, below. Selecting 'Role' returns you to the Role Record shown in Figure 10, above. Selecting 'Cancel Role' returns you to 'View Person Role Record', shown in Figure 8, above.

NOTE: No PIN is displayed since we are looking at the Profile, in which the Person ID of the Profile is displayed.

REMEMBER: PIN and Person ID of the Profile are the same identification number.

PERSON INFORMATION This information is for the current profile.

SSN 2200333 PIN Person ID 0001866150 Set Num A8006271 IMPAC II User ID Com Link to Profile

Last Name Manon First Name J. Middle Name B. Prefix Suffix

Title Citizenship Citizenship Country (LOV) Nursing

Consultant? Availability Status (LOV) Availability Status Date

Addresses Degrees Expertise Employment

PERSON ADDRESS This information is for the current profile.

Type	Phone	Alternate Phone	Fax	E Mail	City	Pref.
Edit HOM	(215) 555-1111		(215) 555-0000	manonjb@chp.org	PHILADELPHIA	<input checked="" type="checkbox"/>
Edit						<input type="checkbox"/>
Edit						<input type="checkbox"/>

COM1200 Problems? Call the Help Desk (301)402-7469 helpdesk@od.nih.gov 02/12/04 15:52

Figure 11. Read-only Profile (COM1200)

3.5 Committee Service History, NIH Support, NRSA Support

From the selections for Committee Service History, NIH Support, and NRSA Support available in the Person Listing Area, you may find more information to help you select the right person or to determine that you need to create a new profile. You know that the J.B. Manon you are looking has grants with both NIDDK and NCI. So, let's look at 'NIH Support' displayed in Figure 12.

Notice that this J.B. Manon has grants with only NIDDK. But John B. Mannon and J. Manon have grants with only NCI (refer to Table 5, above, Rows 7-11). You might want to conclude that these three profiles are duplicates. Since you work at NIDDK, you can check the grants listed easily. You probably know immediately that J.B. Manon is your PI. And the NCI grants are probably J.B. Manon's as well. Another resource is to check Committee Service History and NRSA support. You can also check the Profile data for each hit. If the PI is associated with more than your IC, you may want to check with the other IC to let the IC know about the duplicates. You can contact other IC(s) to verify that the profiles are duplicates and to request a collapse by SQAIB.

SEARCH CRITERIA

<i>Last Name</i>	<i>First Name</i>	<i>Middle Name</i>	<i>SSN</i>	<i>Person ID</i>	<i>Availability Status Code</i>
Man%	J%				<input type="checkbox"/>

PERSON LISTING

Edit Profile	Create Profile	Combine Profile	View Role	View Audit
--------------	----------------	-----------------	-----------	------------

<i>Last Name</i>	<i>First Name</i>	<i>Middle Name</i>	<i>ssn</i>	<i>Institution</i>	<i>Avail. Status</i>
Manon	J.	B.	*****	CHILDREN'S HOSPITAL OF PHILADELPHIA	0
Mannon	John	B.			0
Manon	J				0

Committee Service History
 NIH Support
 NRSA Support

NIH SUPPORT

<i>Project Number</i>	<i>Fiscal Year</i>	<i>Project Title</i>	<i>Role</i>	<i>Total Award</i>	<i>Subproj. ID</i>
1	R01 DK 53970	1	1998	GH-IGF AXIS AND PREDICTORS OF OUTCOME IN BILIARY ATRE	PI
1	R03 DK 58386	1	2000	ETIOLOGY OF GROWTH FAILURE IN BILIARY ATRE	PI
5	R03 DK 58386	2	2002	ETIOLOGY OF GROWTH FAILURE IN BILIARY ATRE	PI
1	U01 DK 62481	1	2002	Mid-Atlantic BANH Consortium Site	PI
5	U01 DK 62481	2	2003	Mid-Atlantic BANH Consortium Site	PI
5	U01 DK 62481	3	2004	Mid-Atlantic BANH Consortium Site	PI

Figure 12 — NIH Support for J.B. Manon (COM1100)

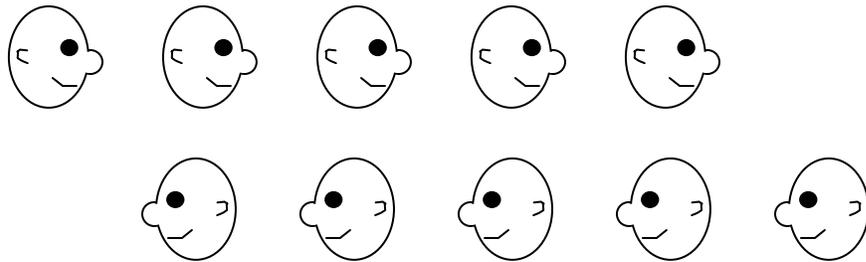
4.0 Acronyms and Terms

Acronym/Term	Definition
check_registers_t	IMPAC II table that contains the checks that have been written to consultants to pay for their expenses when attending meetings.
CM	Committee Management
DHHS	Department of Health and Human Services
eRA	Electronic Research Administration
GM	Grants Management (IMPAC II Module)
IC	Institute/Center
ICO	IC Operations (IMPAC II Module)
ID	Identification
IMPP	IMPAC II Production Database
IRDB	IMPAC II Reporting Database; also stores historical data
NIH	National Institutes of Health
OLTP	IMPAC II Production Database
Person ID	Unique identification number assigned to a record.
person_involvements_t	IMPAC II table that contains information about the role (e.g., PI, trainee, supportee) an individual assumes within a project. This may also include related appointment data (i.e., for trainees) for a specific grant or other project. A separate row will exist for each involvement.
person_role_involvements	IMPAC II table that contains descriptions of the activity related to the assigned role, such as application/grant number, the name of the study group, name of the committee, and so forth.
persons_t	IMPAC II table that tracks information on people within the system. An individual may have more than one row within this table; each role entry for the individual is tied back to the one, and only one, Profile record for the individual.
PI	Principal Investigator
PIN	Person Identification Number (Same as Person ID of the Profile)
POP	Population Tracking (IMPAC II Module)
Profile	IMPAC II record that ties role-level records together
QV	QuickView (IMPAC II Module)
REV	Peer Review (IMPAC II Module)
Role Record	Documents the business of the individual with the NIH
SQAIB	Systems Quality Assurance & Interfaces Branch
TA	Training Activities (IMPAC II Module)
UA	User Administration (IMPAC II Module)

APPENDIX A — PROFILE DATA MANAGEMENT

To Be Provided

**APPENDIX B — PROFILE MANAGEMENT
COMMITTEE MANAGEMENT (IMPAC II MODULE)**



Relevant IMPAC II screens:

CM1010	Nomination/Appointment
CM1050	Meeting Data
CM1080	Committee Management
COM1100	Person Search
COM1200	Person

Additional information available at: <http://impacii.nih.gov/>
Under "1. Applications," select CM to access documentation. Especially helpful is the [CMO User's Guide Ver 3.9.18.0](#) – dated 06/01/2004, pages 117 through 137.

B.1 Introduction

Profile and role records are created or edited when individuals (both external and internal) are nominated to serve on HHS Federal advisory committees, attend FACA committee meetings [Special Emphasis Panel (SEP) and Initial/Integrated Review Groups (IRG)], participate in workgroups and/or site visits, or are Federal Staff who are involved in the management and operation of advisory committees and their related activities. Three areas require users to create or edit profile records:

- Nomination of an individual to serve on an advisory committee.
- Adding non-standing members (TEMP, SEP, Ad hoc participants) or Federal staff to meeting rosters.
- Adding Federal staff under Committee Administration.

B.2 Creating or Editing a Person as a Nominee for an Advisory Committee

As shown in Figure B-1, you can search for an individual from the Person Search screen (Selection 1) then move to the Nomination/Appointment screen from the Person Search screen. Or, you can go directly to the Nomination/Appointment screen (Selection 2)

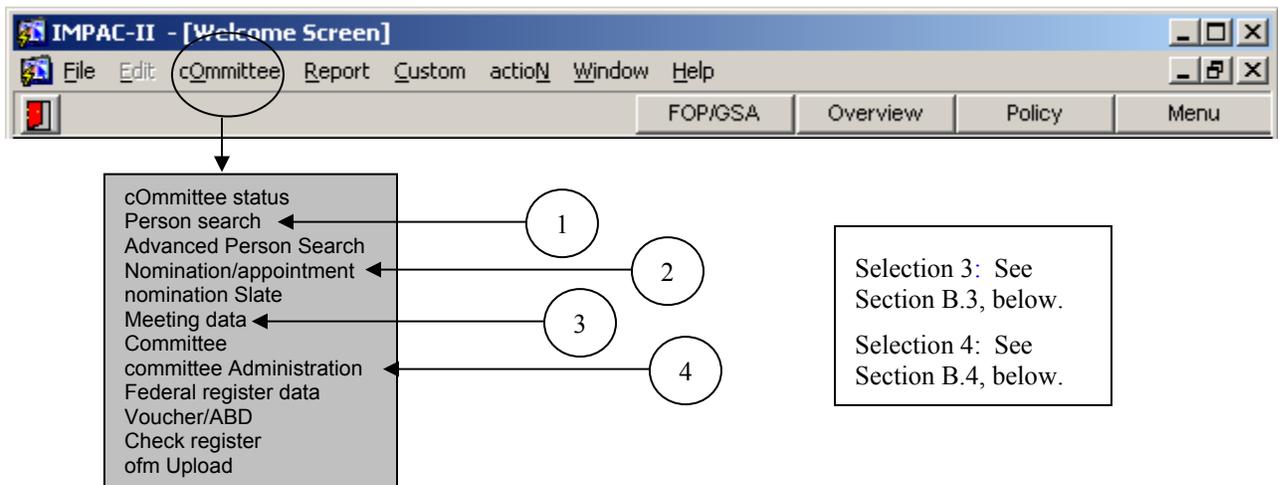


Figure B-1. Accessing the 'Nomination/appointment' Screen

From the Nomination/Appointment screen, CM1010, as shown in Figure B-2, below, you can search for a specific committee, for example 'VR' or a committee member. In the 'Member/Nominee' section: 1. Enter an acronym of an advisory committee. 2. From the List of Values (LOV), select a committee. 3. Execute the query. Results are shown in Figure B-3.

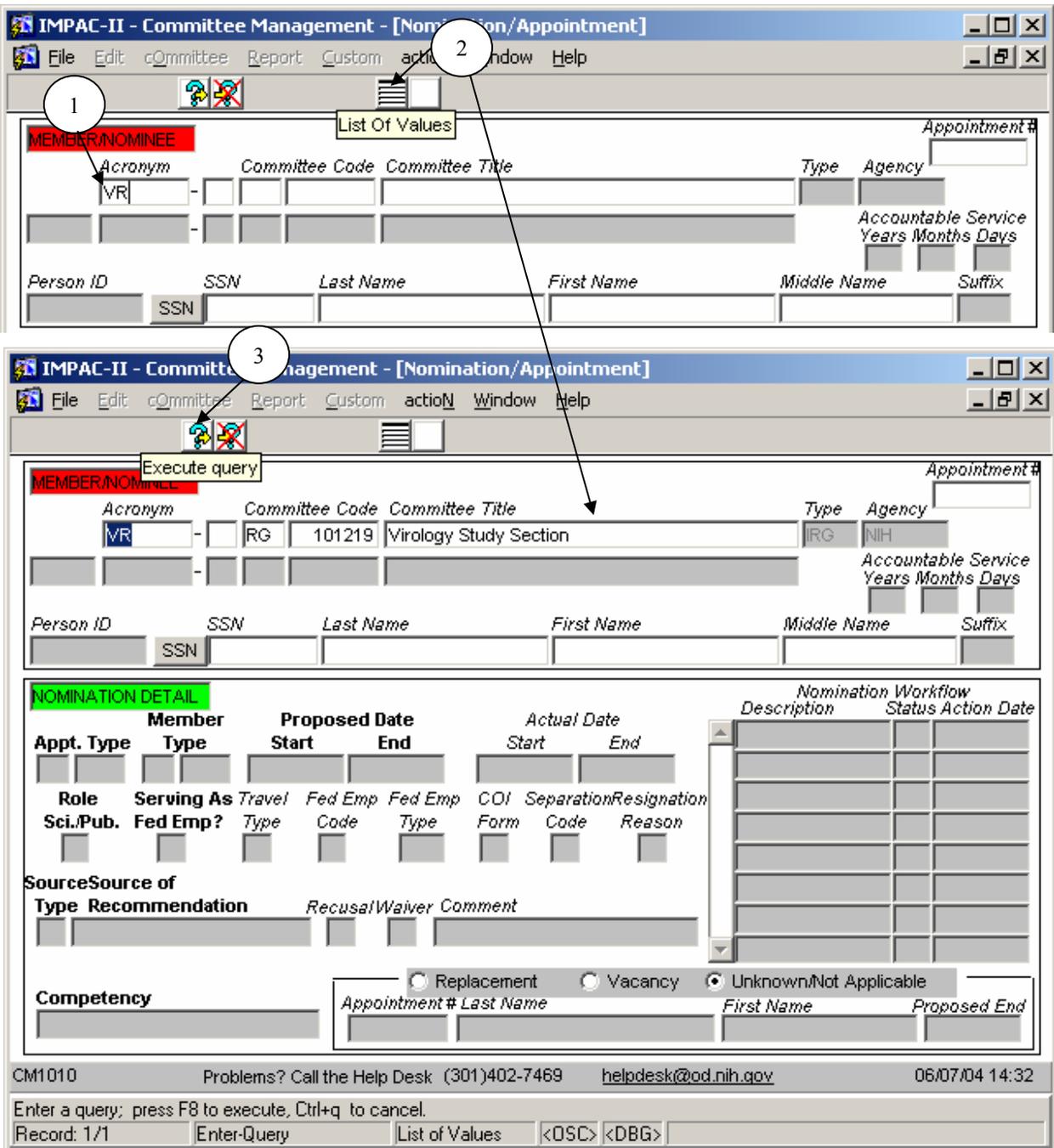


Figure B.2 — Nomination/Appointment Screen (CM1010): Preparing the Query

As shown in Figure B.3, once a committee is identified in the Nomination/Appointment screen, the first record associated with the committee, in this case Joanna Pyper, is listed in the Member/Nominee section. Information about one nominee is displayed at a time, for example, Joanna Pyper. Note on the bottom, left-hand corner of the screen, the Record field that indicates whether this record is one in a series, for example, 1 of 1 (1/1) or one of several records associated with this meeting. Joanna's record is one of several records associated with this meeting, indicated by Record '1/?'. Also note that the 'Person ID' indicates the Person ID of the Role as Committee Member.

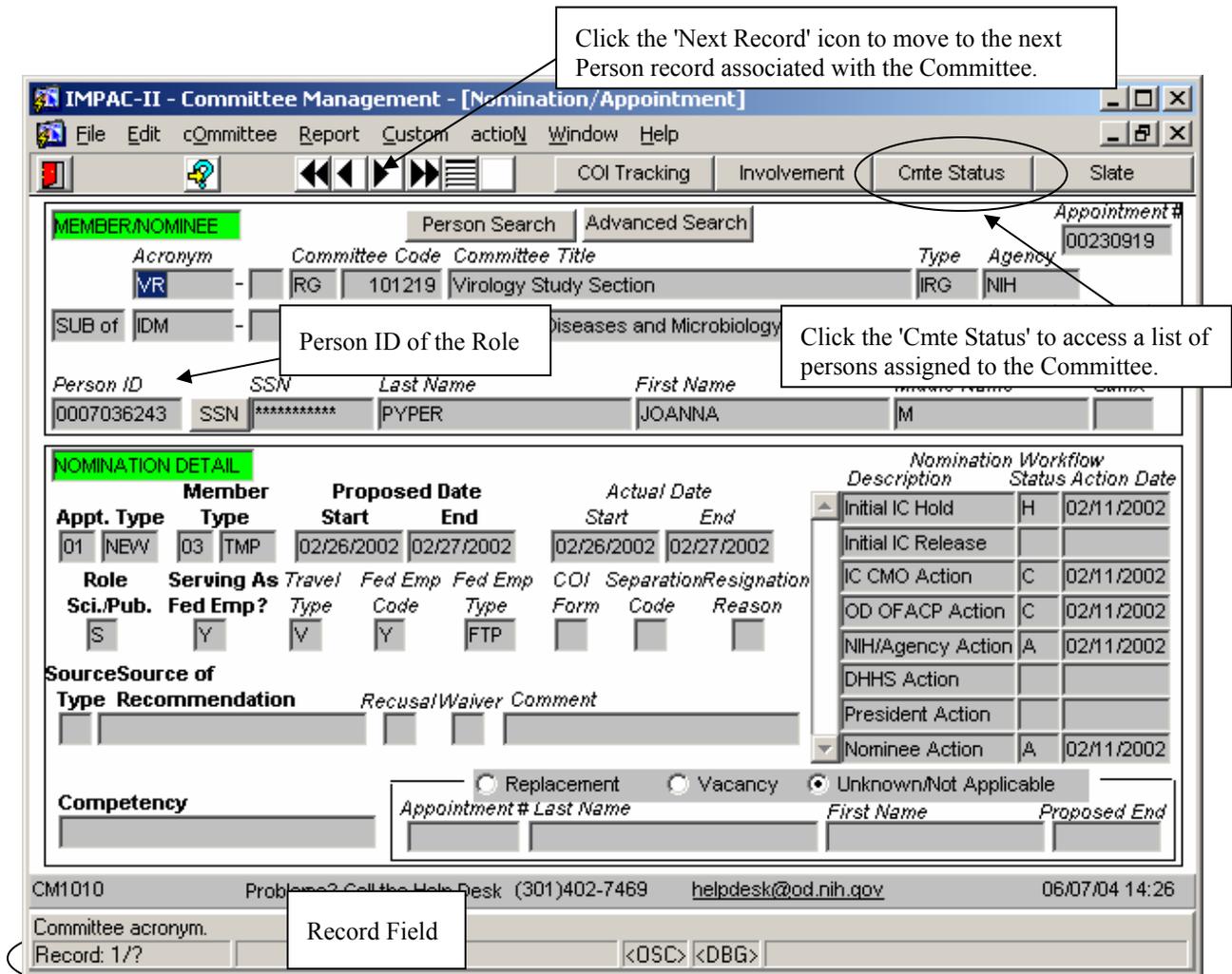


Figure B.3 — Nomination/Appointment Screen (CM1010): Query Results

Notice the two buttons 'Person Search' and 'Advanced Search'. These buttons are displayed after the query is completed. We will use 'Person Search' since it is the most commonly used method to look for an individual in IMPAC II from this screen to add information to the record or to add a new person to the Committee. Selecting 'Person Search' displays the Person Search screen, COM1100, as shown in Figure B.4, below.

Enter all or part of a person's last and first name using the % (wild card). Don't forget that you can also enter the wildcard (%) and the last four digits of the SSN into the Search Criteria section, which may help you find the most correct profile, should multiple profiles exist. After hits are returned, notice that IMPAC II displays additional buttons: 'Create New Prsn as Nominee', 'Select Person as Nominee', 'Cancel Nom'n Updt'.

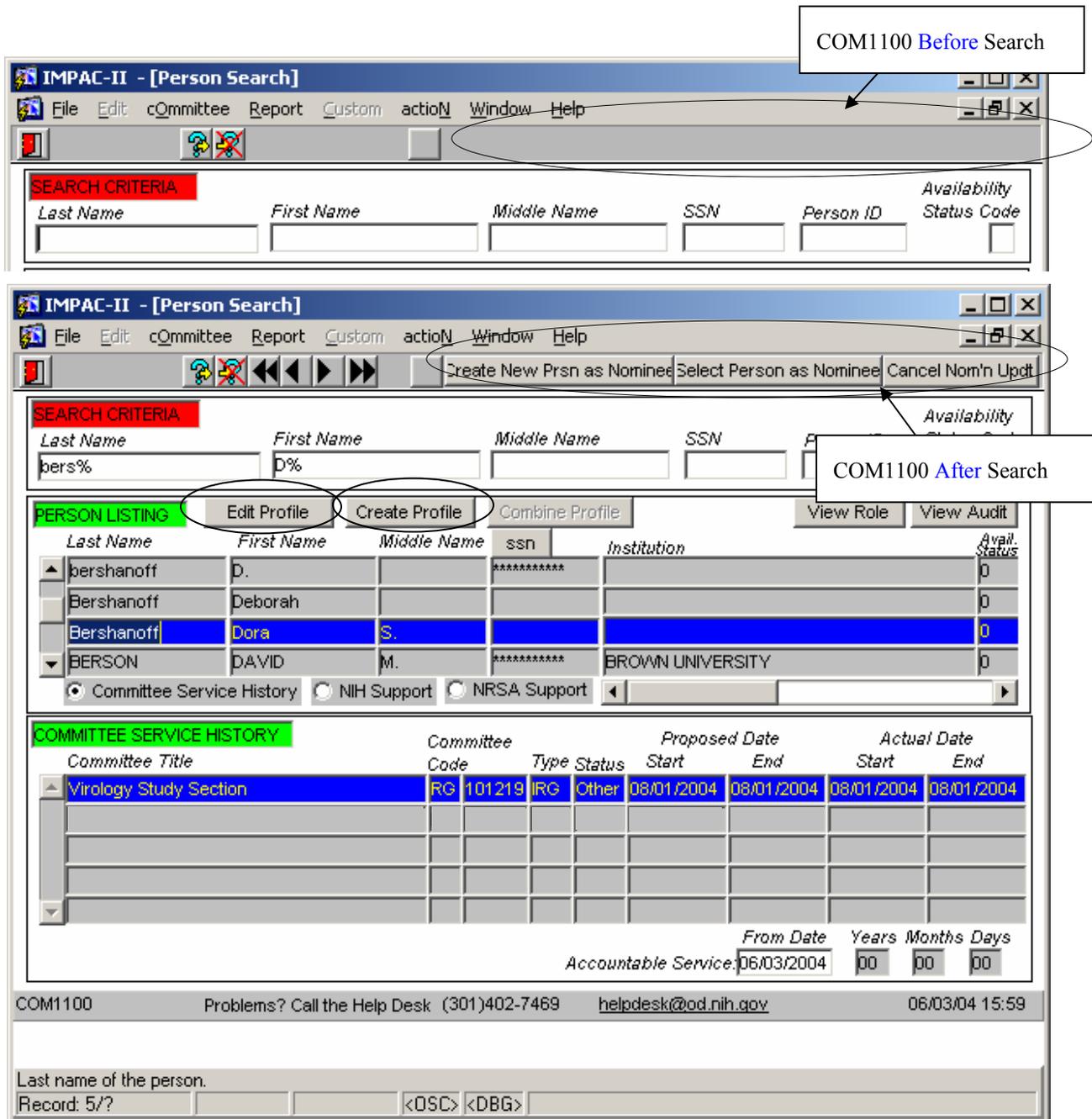


Figure B.4 — Person Search Screen (COM1100): Before and After Search Returns Hits

Before you select a nominee or decide to create a new person as a nominee, you can review data about the person from the 'Person Search' screen, e.g., 'View Role', 'Committee Service History, and Profile data. Select 'Edit Profile' to view an individual's Profile record. You can review Addresses, Degrees, Expertise and Employment history to determine if this is the person you want to nominate to an advisory committee. Another source of information to determine if you have the correct person is the Sensitive Data. Sensitive data includes the Social Security Number, Place of Birth, Date of Birth, ethnic, and gender information. Clicking on the 'Return to Person Search' button will take you back to the 'Person Search' screen.

If the person for whom you are looking is listed on the 'Person Search' screen, highlight that person's row and then select 'Select Person as Nominee'. This accesses the Person screen (COM1200), with additional data required, as shown in Figure B.5. You will be required to copy down addresses, degrees, expertise, and employment information from the Profile into the new Role record of nominee.

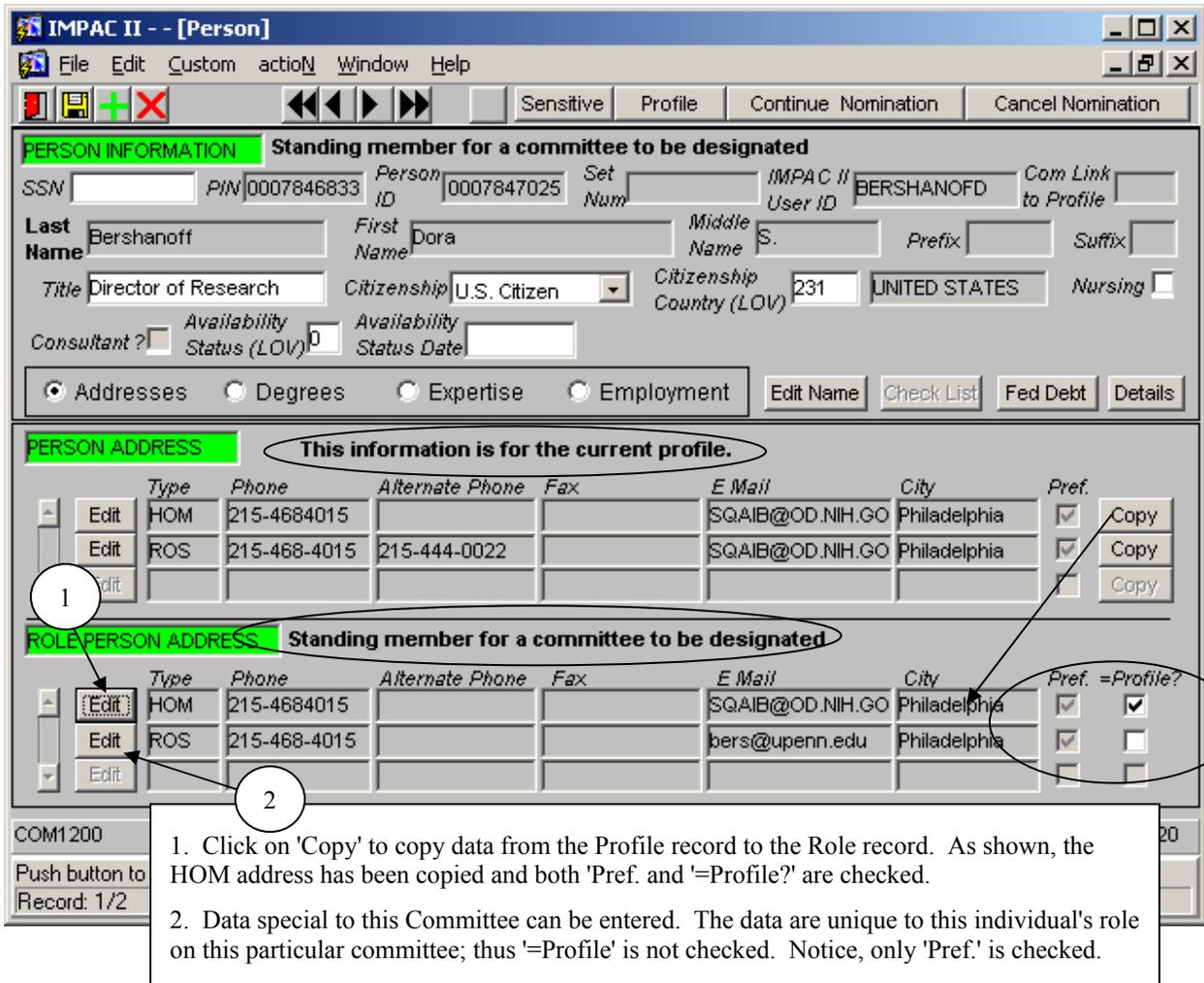


Figure B.5 — Person screen (COM1200): Adding Role Information

Click on 'Continue Nomination' to return to the 'Nomination/Appointment' screen. Information to be provided in the 'Nomination Detail' section required fields are labeled in **BOLD**, such as Appt., Type, Proposed Date (Start and End), and so on.

After Hits are returned in **CM**, if none of the hits is the person for whom you are looking, select 'Create New Prsn as Nominee' to create a new person as a nominee. A blank 'Person' screen (COM1200) is provided for you to fill in. Once all the required data are entered, click on the 'Continue Nomination' button to return to the 'Nomination/Appointment' screen where you will fill in data in the 'Nomination Detail' section.

If you decide you do not want to assign anyone as a nominee, select 'Cancel Nom'n Updt' to cancel the nomination process.

B.3 Creating/Editing Profiles and Role Records When Adding Non-Standing Members On Meeting Rosters

Users may add Temporary Members to the rosters of Initial Review Group (IRG) meetings, Special Emphasis Panel (SEP) participants to SEP meetings, Ad Hoc members to BSC, Council, Program Advisory Committee, and workgroup/site visit meetings. In addition, Federal staff and other non-member observers may be added to all meeting rosters.

Users will start at the 'Meeting Data' screen (CM1050) and highlight the meeting that they wish to add meeting attendees. In order to add individual attendees, click on the 'Add Meeting Attendee' button and select the Attendee Type. Other Member, Previous Member, and Standing Member are all attendees that will participate at the meeting. Federal staff and Other Person are either staff that manage and organize the meeting or staff that will be observers at the meeting. See Figure B.6, below.

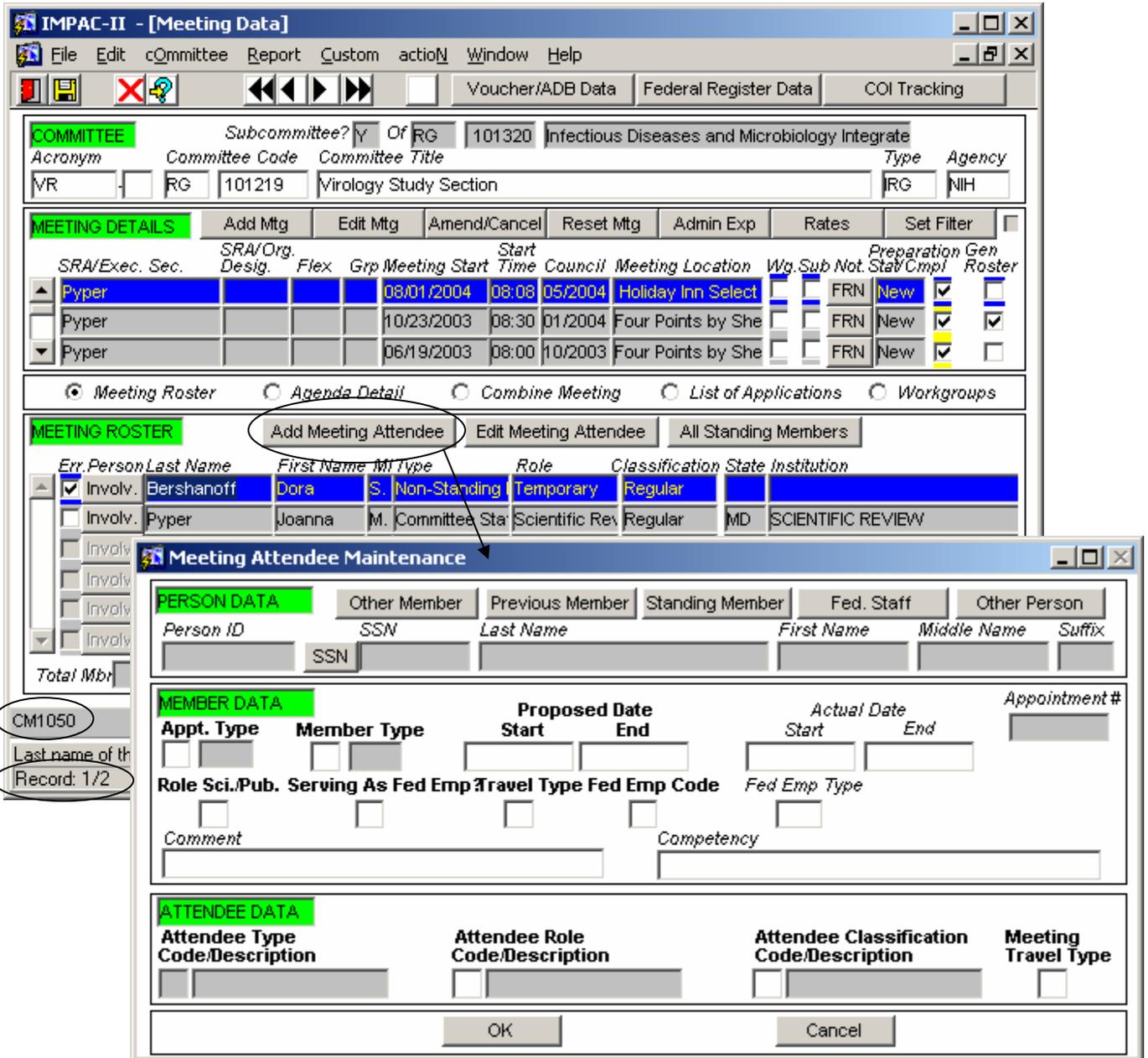


Figure B.6 — Adding an Attendee to a Meeting

If the user selects 'Other Person', the module takes the user to the 'Person Search' screen (COM1100). Enter the name of the person you want to add to the roster. A partial last name and use of the % is encouraged whenever using the Person Search feature. Once the query is executed, you can click on the 'Edit Profile' button to check the person's information to ensure that the correct profile has been selected. As with the nomination process, you have the choice of 'Create Person for Roster', 'Select Person for Roster', or 'Cancel Roster Updt'.

B.4 Creating and Editing Profile and Role Records for Federal Staff

Institute/Center Committee Management Officers have the responsibility for ensuring that the appropriate Federal staff associated with the operation and management of advisory committees are updated in Committee Management. As shown in Figure B.8, below, Federal staff are added and updated through the Committee Administration screen (CM1080). To add Federal Staff, click on 'Federal Staff' then the 'Search' button, to access the 'Person Search' screen (COM1100).

IMPAC-II - Committee Management - [Committee Administration]

File Edit cOmmittee Report Custom actionN Window Help

COMMITTEE Subcommittee? Y Of RG 101320 Infectious Diseases and Microbiology Integrate

Acronym VR - Committee Code RG 101219 Committee Title Virology Study Section

Committee Type RG Initial Review Groups (excluding SEPs) Agency NIH

Federal Staff Affiliations Committee Versions Chairgrant Annual Reports

FEDERAL STAFF Filter

Pri Typ	Person	Last Name	First Name	M	Desig.	Flex	Title	Start Date	End Date
<input type="checkbox"/>	S Search Involv. Costs	Anand	Rita				Scientific Review Adh	01/03/1994	11/27/2001
<input type="checkbox"/>	E Search Involv. Costs	Bershanoff	Dora	S.			Scientific Review Adh	10/01/2004	
<input type="checkbox"/>	S Search Involv. Costs	Hirschberg	Rona	L.			Scientific Review Adh	01/15/2002	06/14/2002
<input checked="" type="checkbox"/>	S Search Involv. Costs	Pyper	Joanna	M.			Scientific Review Adh	04/30/2002	
<input type="checkbox"/>	S Search Involv. Costs	Schneider	Donald	L.			Scientific Review Adh	06/14/2002	
<input type="checkbox"/>	S Search Involv. Costs								
<input type="checkbox"/>	S Search Involv. Costs								

Search for new Federal Staff person to add to the Committee
Access 'Person Search' screen (COM1100).

CM1080 Problems? C 06/21/04 13:36

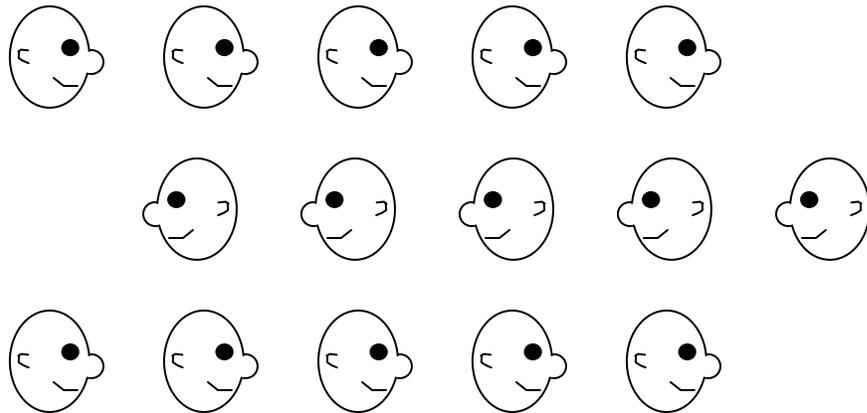
A code identifying if the SRA/GTA is primary on the committee.
Record: 6/6 <OSC> <DBG>

Figure B.8 — Committee Administration Screen

Once the query is executed, the on the 'Edit Profile' button to check the person's information to ensure that the correct profile has been selected. As with the nomination process and the roster process,, as shown in Figure B.9, below, you have the choice to 'Create New Fed Staff Prsn', 'Select Person as Fed Staff', or 'Cancel Fed Staff Updt'. You can copy the required information for the meeting attendee role record or create the profile and create the new role record.

Figure B.9 — Person Search Screen via Committee Administration

**APPENDIX C — PROFILE MANAGEMENT
GRANTS MANAGEMENT**



Relevant IMPAC II screens:

GM1020	GM Search
GM1040	Award
COM1100	Person Search
COM1200	Person

Additional information available at: <http://impacii.nih.gov/>
Under "1. Applications," select GM to access documentation and other relevant information, such as GM Lead Users Group, Release notes, etc.

C.1 The PI — To Edit or To Change?

A task that often causes confusion concerns changing a PI assigned to an application or grant or changing information about a PI assigned to an application or grant. It doesn't sound confusing, but actually performing a "change" or an "edit," if one is not careful, can lead to the troublesome results.

Logon to GM and perform a search on an application or grant. See Figure C-1 below. Notice that a WIP has not been created for the selected grant. To change a PI assigned to an application or grant, or to edit a PI's data, we need to move to the award screen. See Figure C.2, below.

The screenshot shows the IMPAC-II - GM - [Search] application window. The title bar includes the application name and standard window controls. The menu bar contains File, Edit, Grant, Report, Custom action, Links, Window, and Help. A toolbar at the top right has buttons for Assign, ICSTORE, Admin, Award, and Release. The main area is divided into two sections: QUERY PARAMETERS and HIT LIST.

QUERY PARAMETERS

Grant # (LOV) [] [] MH 57511 [] [] Subproject ID [] [] FY [] Appl. Status Group [] [] Appl. ID []

PI Name (L, F MI) [] [] Percentile [] RFA PA # []

Institution [] Priority Score [] Budget Start []

Institution City [] State []

Current Assignment (L, F MI) [] [] Select Current Assignment Clear

HIT LIST Run Query Create Record Create WIP Discard WIP

WIP Exist?	ESNAP?	Grant #	Subproj ID	PI Name (L, F MI)	GS Assignment	Budget Start Dt	SITS
<input type="checkbox"/>	<input checked="" type="checkbox"/>	R01 MH 57511 6		SPENCER, THOMAS J	Herbert, Carmen A.	04/01/2003	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	5 R29 MH 57511 5		SPENCER, THOMAS J	Budd, Emma M.	03/01/2002	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	5 R29 MH 57511 4		SPENCER, THOMAS J	Budd, Emma M.	03/01/2001	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	5 R29 MH 57511 3		SPENCER, THOMAS J	Knipple, Joy R.	03/01/2000	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	5 R29 MH 57511 2		SPENCER, THOMAS J	Mayer, Pamela L.	03/01/1999	<input type="checkbox"/>

GM1020 Problems? Call the Help Desk (301)402-7469 helpdesk@od.nih.gov 12/17/03 13:57

WIP NEEDED TO PROCESS THE AWARD; SELECT RECORD & CREATE WIP IF NOT ALREADY THERE.

Record: 1/5 <DSC> <DBG>

Figure C.1 — Search with Hit List (GM1020)

As shown in Figure C.2, without a WIP, we can neither edit a PI's profile nor assign a new PI to the selected application or grant. A. Without a WIP, no buttons are displayed to allow either "Change PI" or "Edit PI." B. If we create the WIP, IMPAC II displays the selections on the Award screen, as shown.

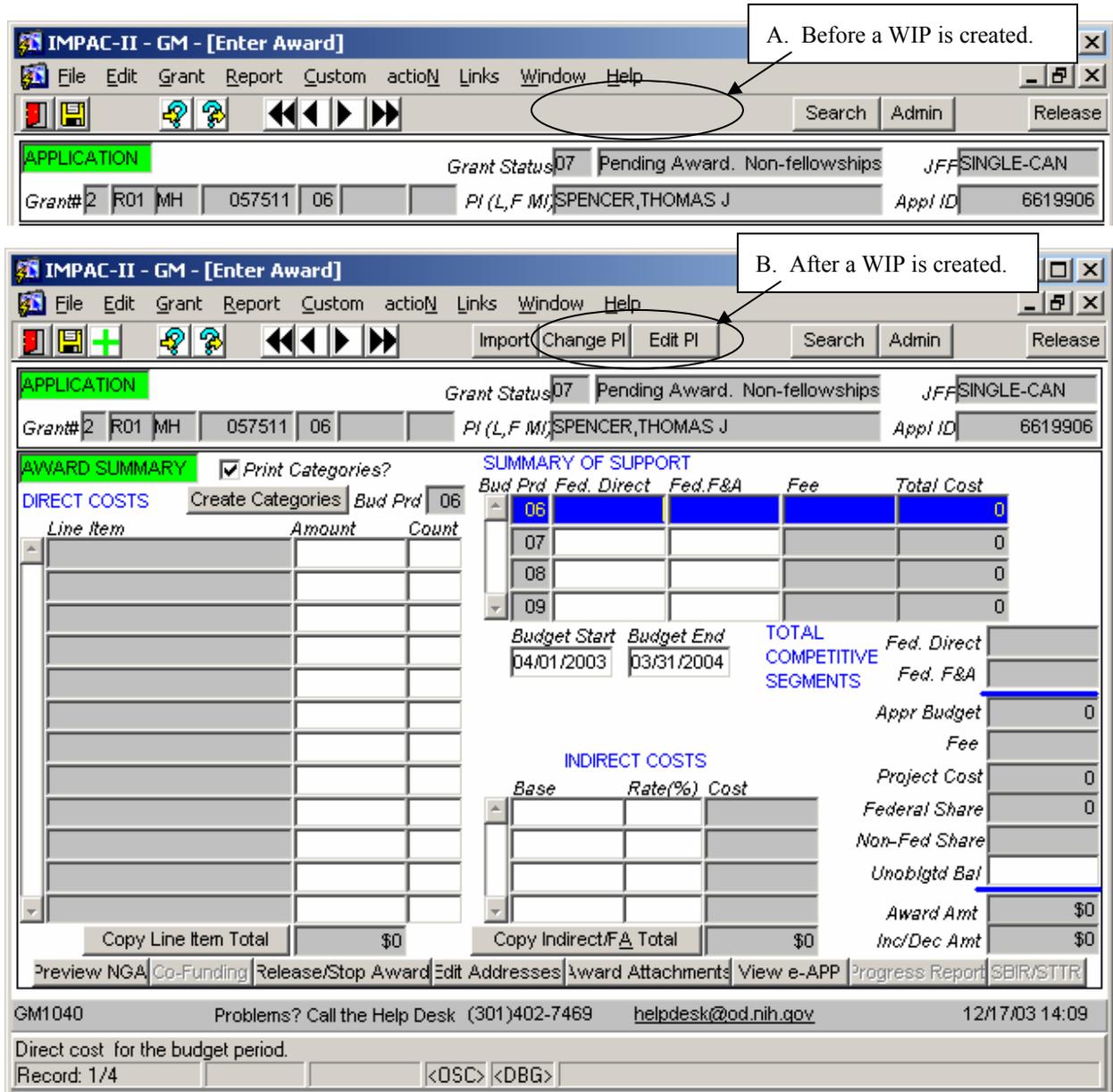


Figure C.2 — Award Screen (GM1040): A. Before a WIP is Created
 B. After a WIP is Created

When a user enters data under a Work-In-Progress (WIP), IMPAC II displays these data only on GM screens. These data are considered "unofficial data." This prevents other applications (for example, QuickView or Committee Management) and data mining tools (such as, SQL*Plus, Oracle Browser, MS Access, etc.) from reporting the unofficial data. As long as the WIP exists, GM displays the unofficial data. When the WIP no longer exists (that is, after award), the GM

application displays the official data created under the WIP. These new data are now displayed in other IMPAC II modules, as well. If a WIP is deleted, any data entered under the WIP are no longer available; they are deleted from the database.

* Several columns are used to support WIP functions within the Grants Management business area. These columns begin with 'WIP' and are used to hold updates for a pending award. The WIP columns are filtered out of the base table APPLS view so that other applications and data mining tools do not see or report on "unofficial data." After the grant has been released the WIP data are copied to the official columns, and IMPAC II deletes the WIP.

C.2 Changing the PI on an Application or Grant

Selecting 'Change PI' from the Award Screen (GM1040) accesses the Person Search screen, COM1100. After performing a search, we can then select 'Create New Person as PI', 'Select Person as PI', or 'Cancel Change PI', as shown in Figure C.3, below.

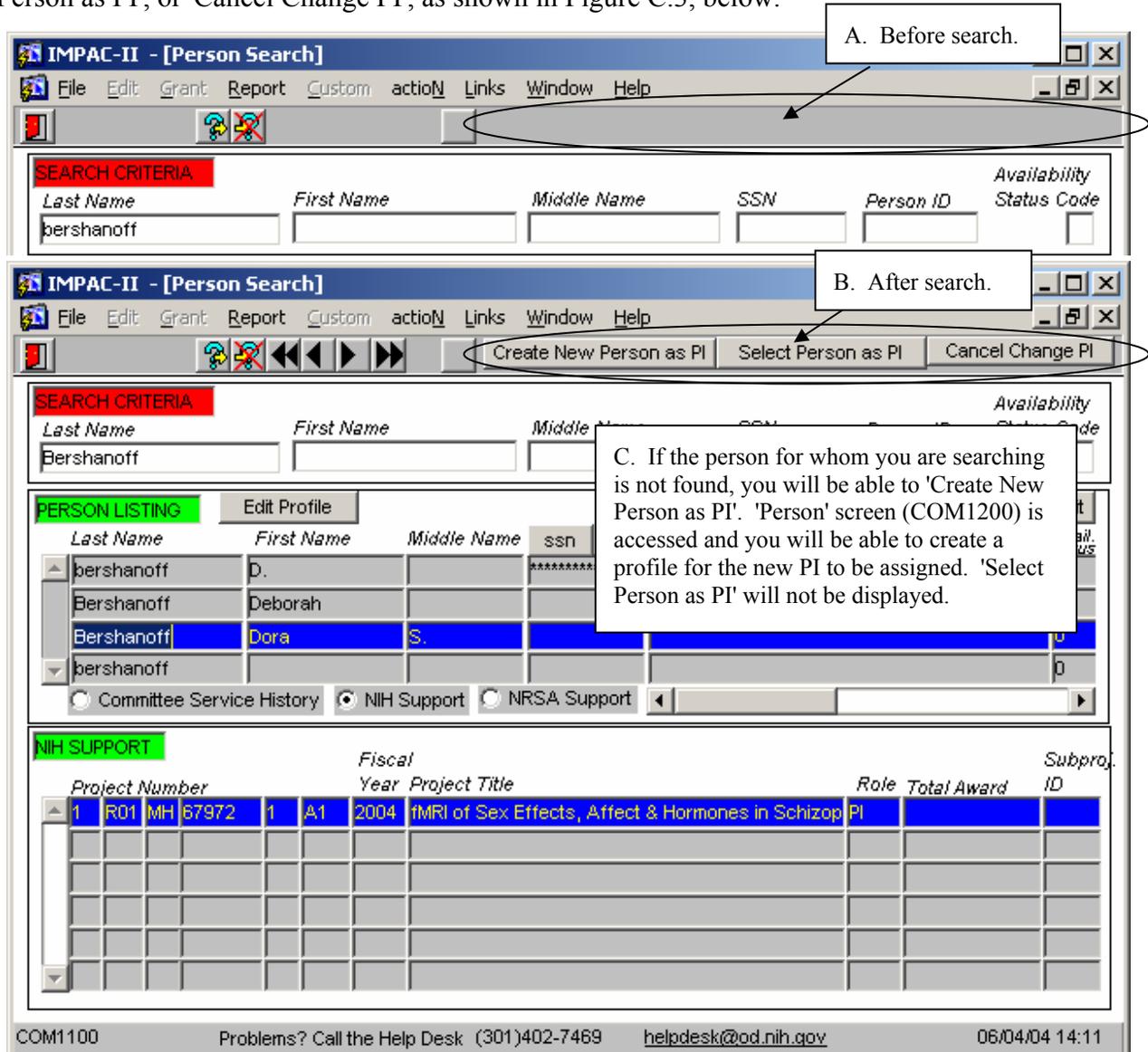


Figure C.3 — Person Search Screen (COM1100)

Selecting an individual as the new PI accesses the person's profile (COM1200), as shown in Figure C.4, below. Notice that the display clearly informs the user that he or she is looking at Profile information and not Role information. If you have rights, you can update Profile data. You can then 'Select/Return to GM' or 'Cancel/Rtn to Prsn Srch' (that is, cancel this selection and return to the Award screen: GM1040).

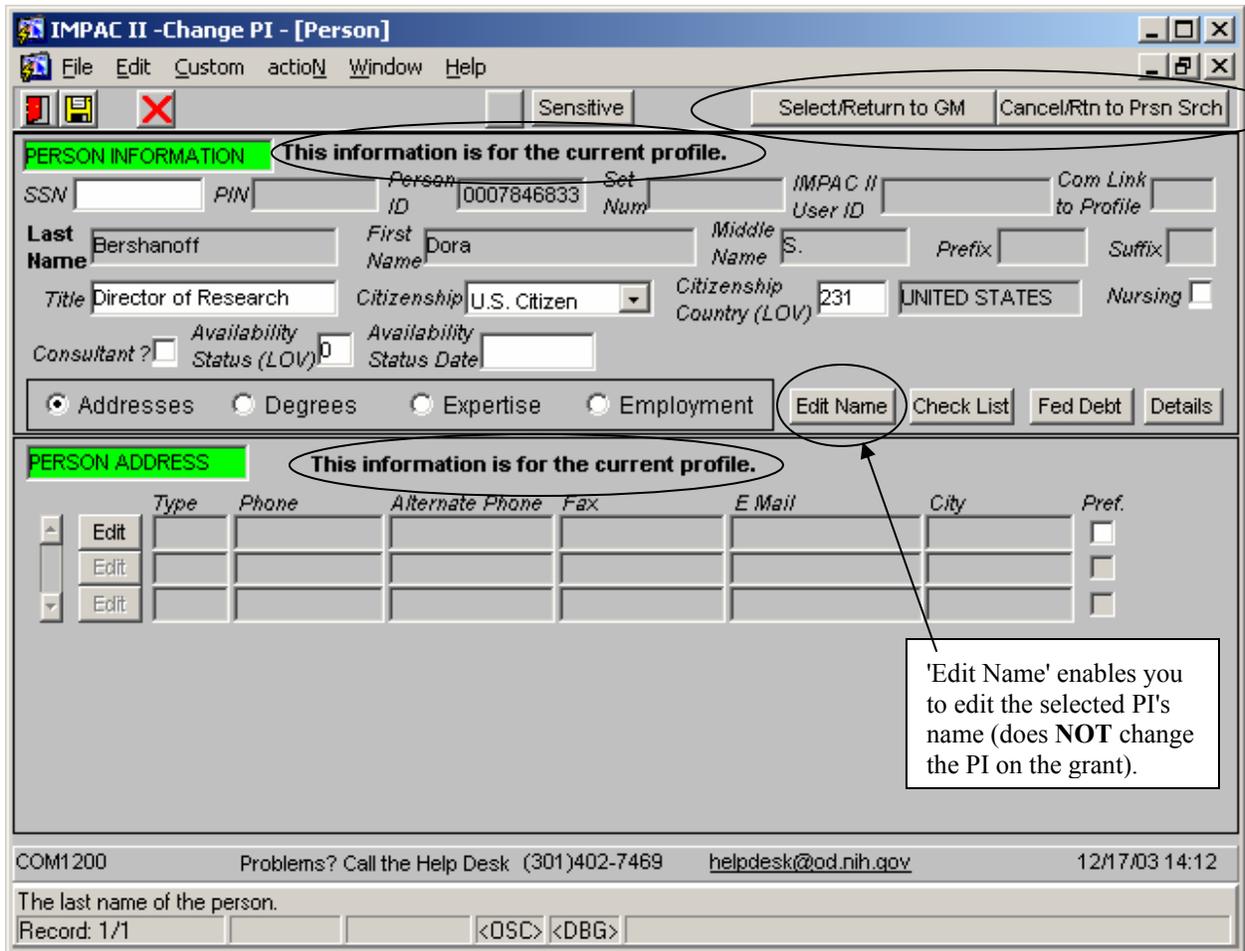


Figure C.4 — Profile Screen (COM1200)

After you have selected the PI as the new assigned PI and returned to the Award screen, you will then want to check the new PI assignment on the 'Search' screen (GM1020). You may notice that the new PI is not listed as you expected. Don't Panic! You need to exit from GM, then logon to GM again. Search for your grant, and the new PI will be listed.

C.3 Edit the PI

Selecting 'Edit PI' accesses the 'Person' screen (COM1200), as shown in Figure C.4, above. **REMEMBER:** Editing the PI allows you to edit data about the currently assigned PI. Selecting 'Edit Name' allows you to change information on the currently assigned PI. It does **NOT** assign a new PI to the existing application or grant.

APPENDIX D — INSTITUTE/CENTER

To Be Provided

APPENDIX E — IC OPERATIONS (IMPAC II MODULE)

To Be Provided

APPENDIX F — POPULATION TRACKING (IMPAC II MODULE)

To Be Provided

APPENDIX G — QUICKVIEW (IMPAC II MODULE)

To Be Provided

APPENDIX H — PEER REVIEW (IMPAC II MODULE)

To Be Provided

APPENDIX I— TRAINING ACTIVITIES (IMPAC II MODULE)

To Be Provided

APPENDIX J — USER ADMINISTRATION (IMPAC II MODULE)

To Be Provided